



Hawai'i Tourism Oceania

2005 Marketing Presentation...

G'Day

Kiora

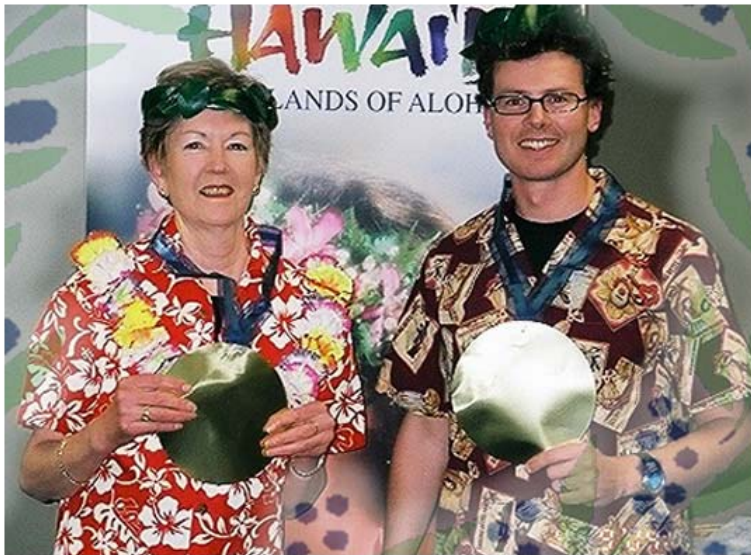
Aloha

...of OLYMPIC Proportions!

Introducing the
Aussie Team –
Helen Williams &
Gemma O'Brien



Introducing the
NZ Team –
Darragh Walshe &
Jill Gardener



HAWAII!

Hawai'i Tourism Oceania

Market Overview

The Economy

 Strong economic environment:

-  Consumer Price Index @ 2.5%
-  Unemployment @ 5.6%
-  Consumer confidence med-high

 Upcoming Federal Election -
Oct 2004

 Economic Outlook

Market Overview

USA & Hawaii Trends

Travel to USA decreased overall 2001 - 2003

Forecast to increase in 2004 by 7%

Length of stay '03 to the USA = 22.3 days, Hawaii = 9.2 days*

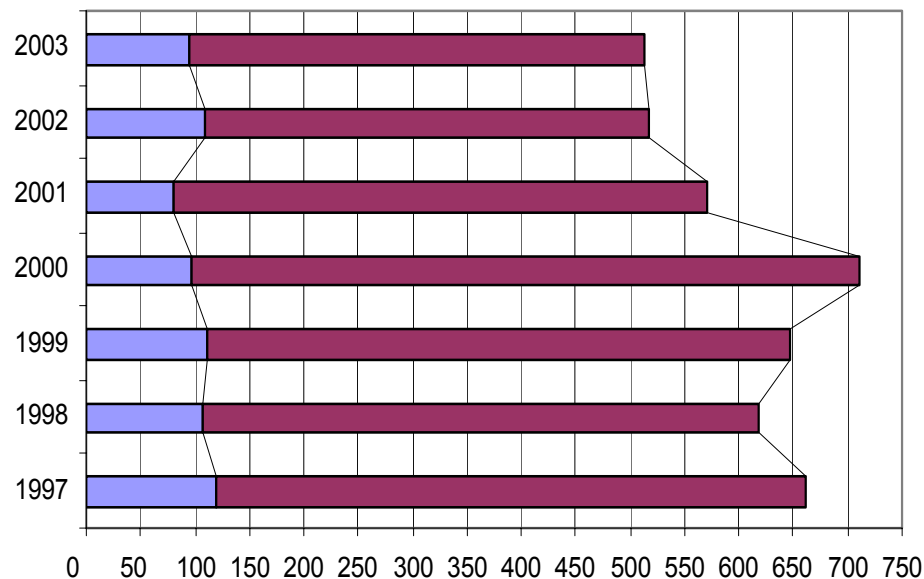
Spend = \$157.40 p/d, \$1448.00 p/stay*

Seasonality for travel to Hawaii

- High = Jan, Sep, Dec
- Shoulder = May, Jun, Jul, Aug, Oct
- Low = Feb, Mar, Apr, Nov

*preliminary data

Australian and New Zealand Arrivals to Hawaii and the US Mainland



Arrivals (000's) to Hawaii and the US mainland



Hawai'i Tourism Oceania



Market Overview

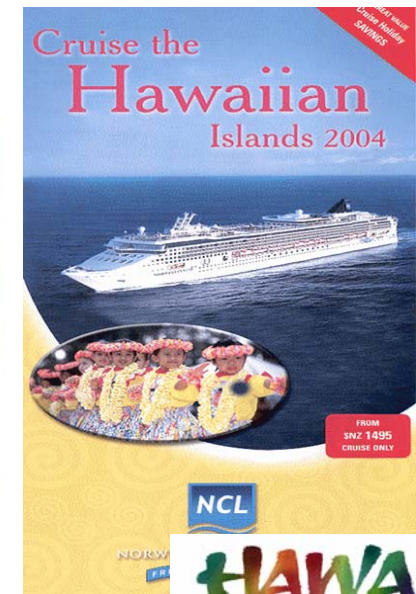
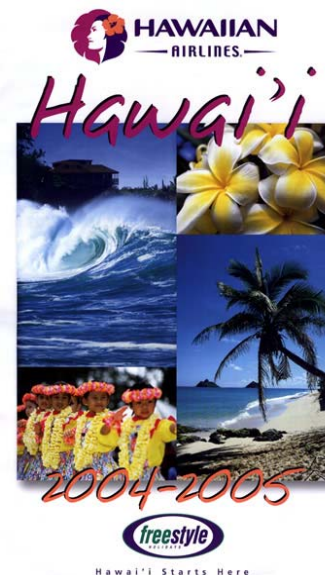
Wholesalers, Retailers Airlines

- 🏅 Tour Wholesaler activity increased significantly with figures quoted between +20% - +30% vs 2003
- 🏅 Brochured products for 2005 will offer greater diversification
- 🏅 Retailers advertising on TV & in the press
- 🏅 Airlines report flight loads strong through to end Jan 2005
- 🏅 Favorable QF flight schedule change

2004 Gold Medal Achievements

Trade Partner Co-op Marketing Efforts

- 🏆 2004 Strategy recap:
 - 🏆 Increase Hawaii's brand awareness
 - 🏆 Training (retail and wholesale)
 - 🏆 Build strong relationships with Tour Wholesalers
- 🏆 By Aug '04 , 4 new wholesaler (brochured) programs in the market



2004 Gold Medal Achievements

Trade Partner Co-op Marketing Efforts

By Aug '04, HTO had participated in several major Co-op

campaigns

aloha
Hawaii

The Month of May
is the Month of Lei

Honolulu 4 nights from only

\$1229*

Package includes:

- 4 nights' sleeping class, antiques, shopping, art, dining, and more
- 4 nights' accommodation at one selected hotel

Accommodation options

Ohana Mole Sky Court
(Standard) - Standard Room

Located on the 10th floor, this room offers a view of the city and the ocean.

23 May 04 - 31 May 04 \$1,229 - \$1,499

Ohana Walkie Tower
(Standard) - Standard Room

Located on the 10th floor, this room offers a view of the city and the ocean.

23 May 04 - 31 May 04 \$1,229 - \$1,499

Ohana Islander Walkie
(Standard) - Standard Room

Located on the 10th floor, this room offers a view of the city and the ocean.

23 May 04 - 31 May 04 \$1,229 - \$1,499

Outrigger Reef On The Beach
(First Class) - City View Room

Located on the 10th floor, this room offers a view of the city and the ocean.

23 May 04 - 31 May 04 \$1,229 - \$1,499

Flights, accommodation and
100 flowers on arrival. Be there.
The Month of Lei is the Month of Hawaii.



Explore the Outer Islands

Cruise the Islands
with Norwegian Wind

Campaign – 'Month of Lei Promotion'

Partners – Air New Zealand, Travel Plan, HTO, Gulliver's Pacific, Infinity Holidays, Travel Online, Escape Holidays, Travel Today, Tabs on Travel

Medium – Multifaceted

HAWAII!
THE ISLAND OF ALOHA

AIR NEW ZEALAND

Travelplan

HAWAII!

Hawai'i Tourism Oceania

2004 Gold Medal Achievements

Travel Trade Efforts

🏅 "Aloha Down Under" Road show

🏅 Retail & Wholesale special \$99 airfare to experience Hawaii first hand



🏅 Travel Trade magazine supplements

🏅 Aloha Friday key wholesaler training

🏅 Trade industry promotions
Famili's trips

🏅 Enhanced Hawaii product offered



HAWAII

New flights spark revival

Rubin Reyes
HAWAII, stifled for years as a destination by a lack of airline capacity and competition in the Australian market, is experiencing a resurgence in bookings following the re-introduction of Hawaiian Airlines services from Sydney.

"The four flights a week from May 18 will add 40,000 seats a year which is very significant," Hawaii Tourism Oceania (HTO) manager Australia Helen Williams said. "There's been a huge build-up of demand for the destination which in the early 1990s was attracting 350,000 Australians a year."

The re-entry of HA on the route, and its subsequent marketing and travel agent blitz, has produced a surge in bookings with a range of low cost package deals adding to the destination's attractiveness.

In late March, Hawaii operators and wholesalers launched a major week-long promotional campaign highlighting its new services and products to travel agents, resulting in "solid forward bookings" into the second half of the year.

"The results have been nothing short of outstanding," HA president Mark Dunderberg said.

Helen Williams said HTO's immediate aim was to re-establish the Hawaii brand and re-exist agents.

"We have to work with the industry on training issues," she said. "Most agents haven't been to Hawaii and don't have first-hand knowledge of the product. We will bring Hawaii operators to Australia so agents and wholesalers can get direct contact with the product available, and so the operators can also re-acquaint themselves with this market."

She said HTO would work directly with wholesalers in co-operative promotions.

From May 31 to June 4 HTO will host the 'Aloha Down Under Roadshow' in Australia's eastern seaboard in conjunction with HA.

Roadshow dates are June 1 (Sydney), June 2 (Melbourne) and June 3 (Brisbane). More than 20 Hawaii operators will attend.



HAWAII

\$99 fare lure for agents who attend 'Aloha Down Under'

CHEAP \$99 flights to Hawaii aren't the only motivation for attending Hawaii trade seminars in early June, but they will be on offer according to Hawaii Tourism Oceania's country manager Helen Williams.

"I'd have to honestly say that agent knowledge of the destination at the moment is low," said the country manager for Australia, who said the seminars are aimed to build on the wave of rejuvenated interest in the island.

Williams said, she said Hawaii Tourism's marketing plan for 2004 placed significant emphasis on agent education and aimed to build on the wave of rejuvenated interest in the island.

Hawaii which is an incredibly important part - to get everyone there to experience it," she said.

Agents aren't the only ones being targeted.

cultural values, especially off the lightly visited Oahu and Maui.

The roadshow will showcase about 20 Hawaiian suppliers in Sydney June 1, Melbourne June 2 and Brisbane June 3. About 250 agents are expected to attend each event.

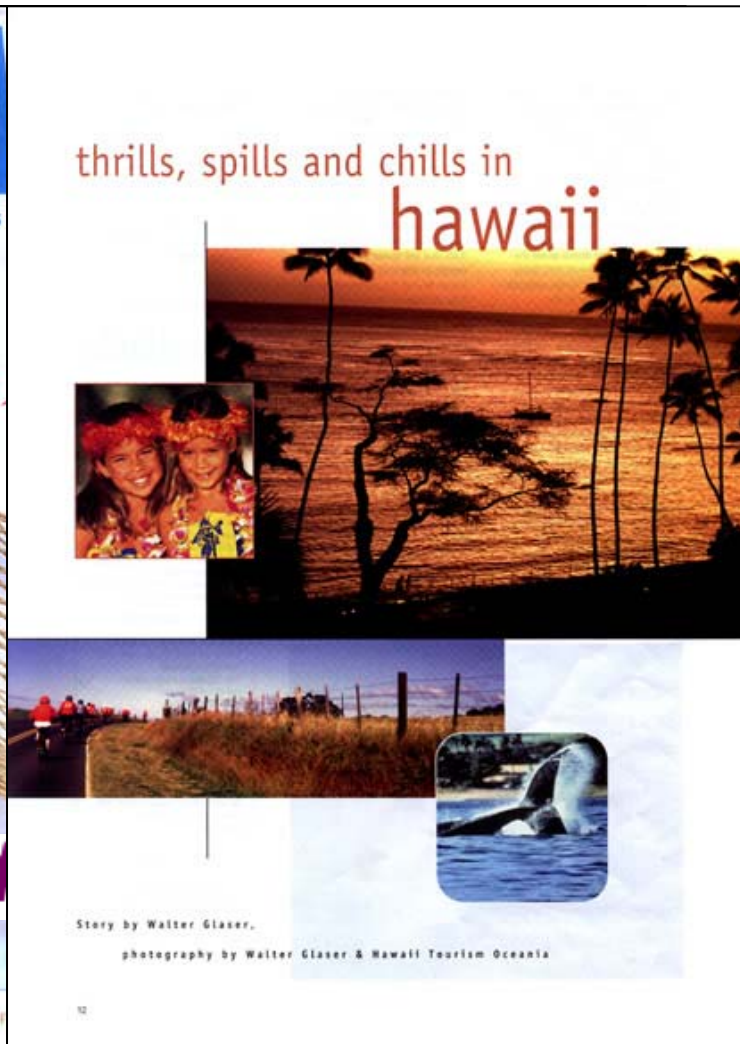
"There has never been a better time to learn about the Hawaiian islands and its tourism products,"



Hawai'i Tourism Oceania

2004 Gold Medal Achievements

Major Public Relations Efforts



\$ \$350,000

HAWAII!

Hawai'i Tourism Oceania

2004 Gold Medal Achievements

Major Public Relations Efforts



National TV – Australia



"Sunrise" – National TV, 7 day outside broadcast from Hawaii



"The Great Outdoors" – National TV, 5 travel show segments



National TV – New Zealand



"Taste of Hawaii" – leisure lifestyle show

Total value of TV exposure US \$2,400,000

Fly Direct to the
"Heart of Europe"

Austrian
Austrian Airlines

Singapore to NYC
non-stop record

AN inaugural Singapore Airlines non-stop flight from Singapore to New York has arrived at Newark Airport in the US, setting a new long-distance record.

It left Changi to the strains of Frank Sinatra's famous ballad New York, New York.

And when they arrived at Newark each passenger was handed an apple (as in Big Apple).

The long-range Airbus A340-500 covered almost 17,000km.

Flights take 18 hours, cutting 4 days of the time for a one-stop stop.

THE Singapore Airlines has a

TRAVEL DAILY

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Hawaii Sunrise meltdown

The phone system at Jetset Travelworld "went into meltdown" yesterday during the first broadcast of the Channel 7 Sunrise show from Hawaii.

The retail group won't have call statistics till tomorrow, but a staffer said today that Friday response was bigger than for the Sunrise broadcast from Las Vegas in Feb.

When the show was pulling in 300,000 viewers at its peak.

This week it's being beamed live from various locations on Oahu.

Long-time South Pacific w/saler dies

A wholesaler cooked with coconut much of the South Pacific

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Walshes gets Indian

THE Walsher Group has been appointed as gas for Indian Airlines in Australia.

India's biggest domestic airline also serves 16 int'l destinations.

The appointment comes ahead of a new push into the Indian market, with wholesalers expanding their programs to take advantage of Qantas' return to Mumbai (Bombay) in Sep.

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July Fourth exodus

A record 39.4 million Americans will travel 50 miles (80km) or more from home this Fourth of July holiday weekend - up 3.4% on a year ago, according to the Travel Industry Assn of America.

A projected 4.5% increase in air travellers will see close to 5 million taking to the sky.

Israeli promo 'blitz'

THE Israel Tourism Office is running promotions in Jul in Sydney, Melbourne and Brisbane to capitalise on a jump in traffic.

Outbound members to Israel in Jan-May 04 grew 90% compared to the same period last year, according to the d.o. of the office, David Beitman.

Hawaii booking avalanche

CASH registers at Jetset Travelworld are ringing like never before.

The retail group today reported massive response to its week-long Hawaii promotion on Channel 7's Sunrise program.

It took some 500 bookings between the opening of business this morning and early afternoon.

Yesterday it was claiming that the promotion was pulling in bookings at a rate 60% above a successful Las Vegas exercise in Feb.

But today a spokesman said the increase is well over 100%.

"If we stopped taking bookings for Hawaii right now we'd still have more business than we got

under it!" shows the pulling power of the electronic media.

Qantas' Hols has sponsorship links not only with Sunrise, but also with Channel 7's The Great Outdoors and the high-rating Channel 9 show Grips.

But Q&A chief operating officer Simon Bernards says the Hawaii exercise is proving to be the most successful to date.

He believes that's because it's what he calls an integrated promotion - there's well-priced content, major retail backing and week-long promotion.

"These things are quite expensive to do, but if they're done well and they're fully-integrated,

they can be very effective."

AN announcement on a packed Southwest Airlines flight from

Perth to Baltimore in the US

"If you're sitting in a window seat, please press your face to the window so the other airlines can see how full our flight is."

TOURISTS to South Australia may soon get a new experience of Adelaide after its council last night voted to invite a group to play elevator-style music including artists such as Barry Manilow and Barry White over loudspeakers in city laneways.

The proposal is aimed at reducing crime.

POLICE were called to a photo shoot by celebrity model Naomi

Aravanis community with 16 exhibits. Holidays and tapas have

VALUES TOURS

A more extensive examination found the bag to only contain clothes and the terminal opened soon after two hours.

A German firm which offers alibi

was not a person's great success barriers.

A German firm which offers alibi

HAWAII!

Hawai'i Tourism Oceania

2005 Marketing Program Highlights & Key Objectives



1. Increase visitor numbers by supporting profitable airlift



2. Increase trade and consumer knowledge of the destination



3. Seek visitors who will participate in Hawaii's destination experiences





2005 Marketing Program Highlights & Key Objectives

1. Increase Visitor Numbers by SUPPORTING PROFITABLE AIR LIFT

- Assist airlines in co-op campaigns
- Align advertising/promotional efforts where appropriate



2005 Marketing Program Highlights & Key Objectives

2. Increase Trade and Consumer DESTINATION KNOWLEDGE

- 🏊 **New** – Specialist e-learning training
- 🏊 Ongoing destination training
- 🏊 Aloha Down Under road show
Sydney, Melbourne, Brisbane, Auckland
- 🏊 Targeted media focus - Visiting Hawaii
Journalist Program (VHJP)
- 🏊 Targeted travel agent/tour wholesaler famils
- 🏊 **New** – Advertorial features
- 🏊 **New** – Joint retailer activities



2005 Marketing Program Highlights & Key Objectives


3. Increase VISITOR LENGTH OF STAY

- 🏊 Showcase the individual islands
- 🏊 Highlight activities & events
- 🏊 Promote the host culture
- 🏊 Increase number of islands visited per stay
- 🏊 Target Life-stylers and Luxury collection segments



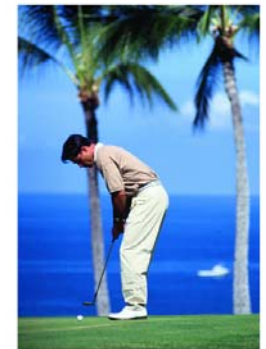
2005 Marketing Program Highlights & Key Objectives

4. Seek Visitors who will participate in Hawaii's destination experiences

- Target suitable publications to highlight the plethora of things to see & do
- Educate & broaden the perception of Hawaii
-  Develop niche markets
 -  Golf, weddings, honeymoons, major events, spa, wellness vacations
-  Position Hawaii as dual purpose destination
 -  Business & leisure

2005 Opportunities to Join Our Team

Month	Activity
January	Bridal Expo, Australia
February	AIME, Australia
February	Visit USA, NZ
February	See America Down Under, Australia
February	Flight Centre Consumer Shows, NZ
Feb, Mar, Apr, Aug	Holiday Expo Consumer shows, AUS & NZ
27th May – 2nd June	Aloha Down Under NZ and Australia
June/July	Advertising in Hawaii Trade Features
August	PGA Golf Show, Australia
All Year	Hosting Visiting Journalists



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Hawai'i Tourism Oceania



Hawai'i Tourism Oceania

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Aloha See Ya! Hāere ra

